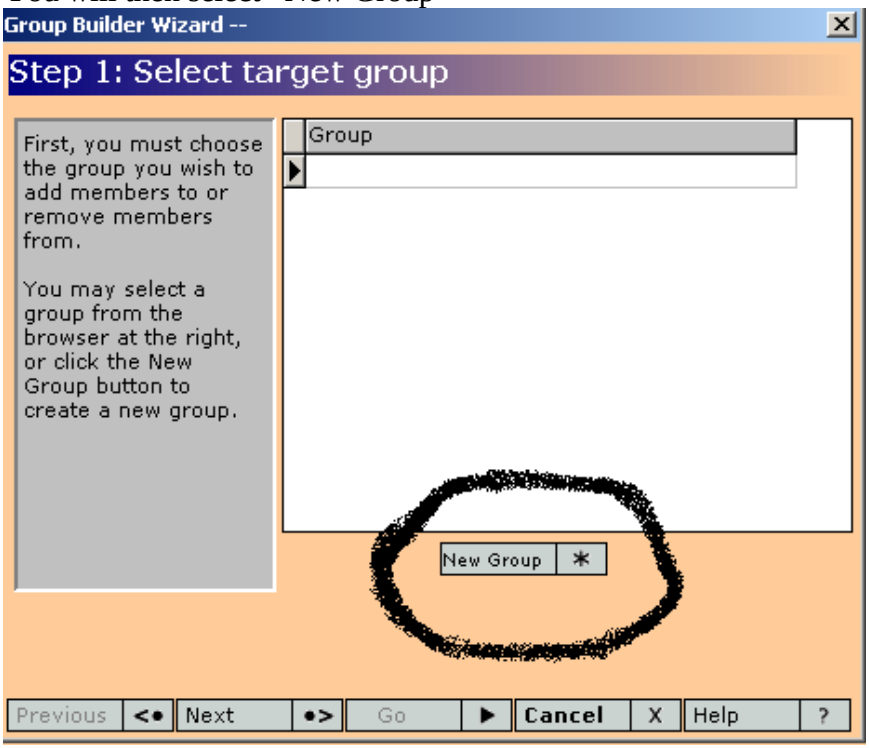
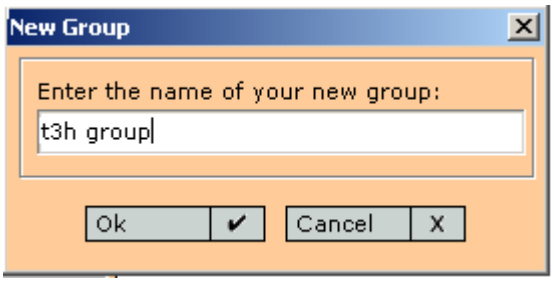
Group Builder Wizard

The easiest/fastest way to create a group in Membership PLUS is by using the Group Builder Wizard. This can be accessed by clicking Module on the Menu bar, then clicking on Group Builder Wizard. See below.

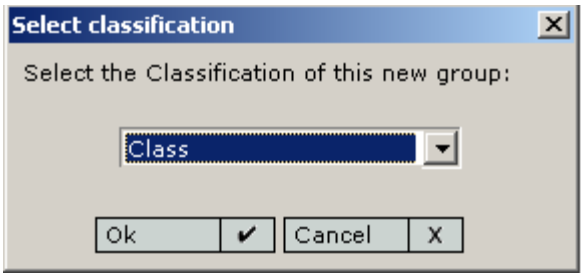
You will then select *New Group


Group Builder Wizard --
Step 1: Select target group
First, you must choose the group you wish to add members to or remove members from.
You may select a group from the browser at the right, or click the New Group button to create a new group.
Group
New Group *
Previous
Next
Go
Cancel
Help

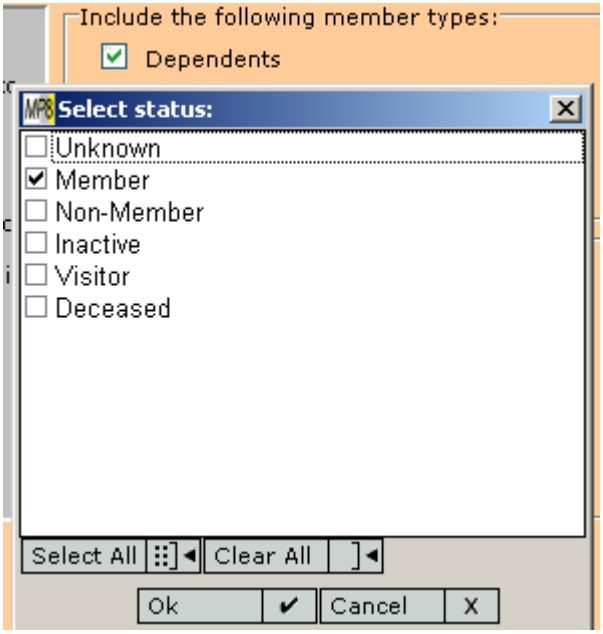
You will be prompted to type the name of the group and press Ok.



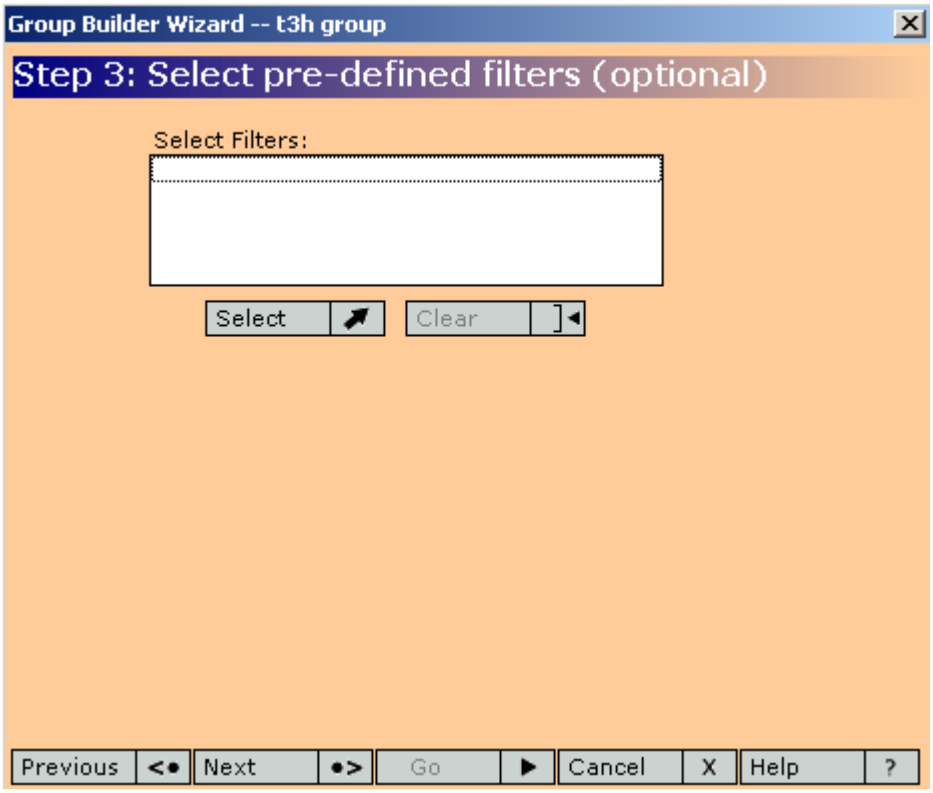
Then Select the group classification. We'll use "Class" for this example.



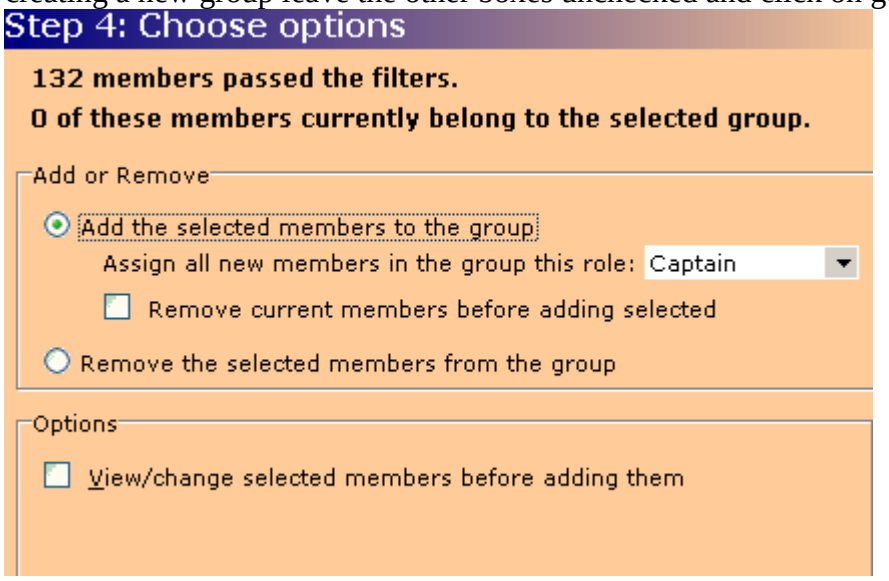
We're going to include only Dependents with a status of Member. If you want to include everybody, check all of the boxes under Include the following member types.



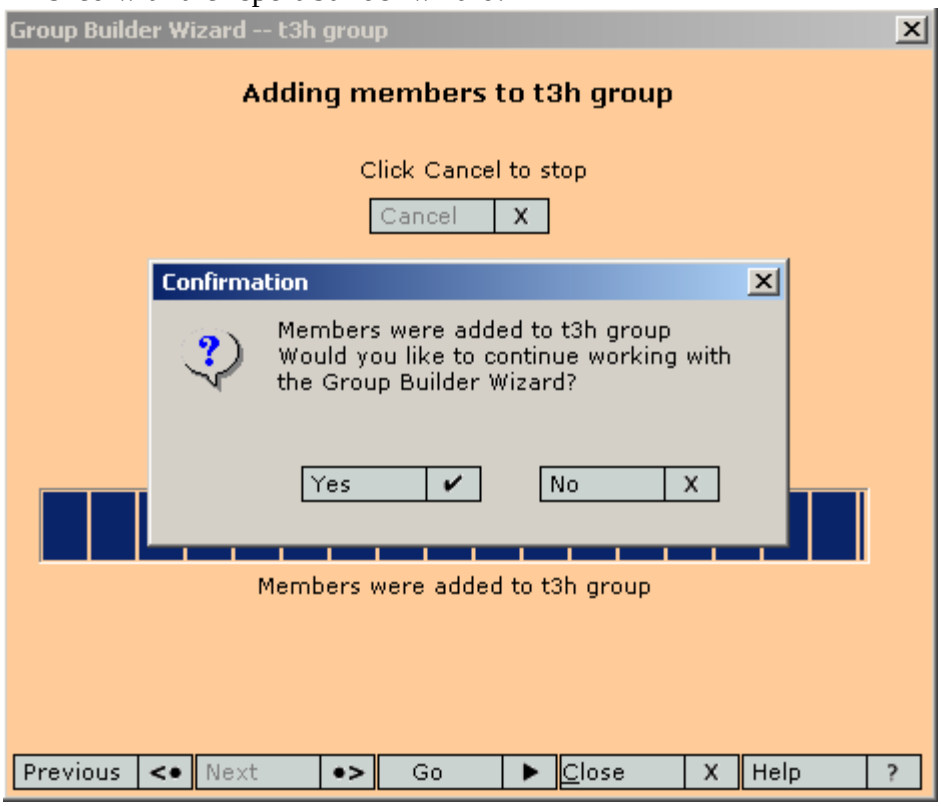
Skip the select filters option and click Next.



Then it's going to show how many people passed. You can assign a role to the member's in the group, we're going to assign all these new members w/ the captain role. For creating a new group leave the other boxes unchecked and click on go.


Step 4: Choose options
132 members passed the filters.
0 of these members currently belong to the selected group.
Add or Remove
Add the selected members to the group
Assign all new members in the group this role:
Captain
Remove current members before adding selected
Remove the selected members from the group
Options
View/change selected members before adding them

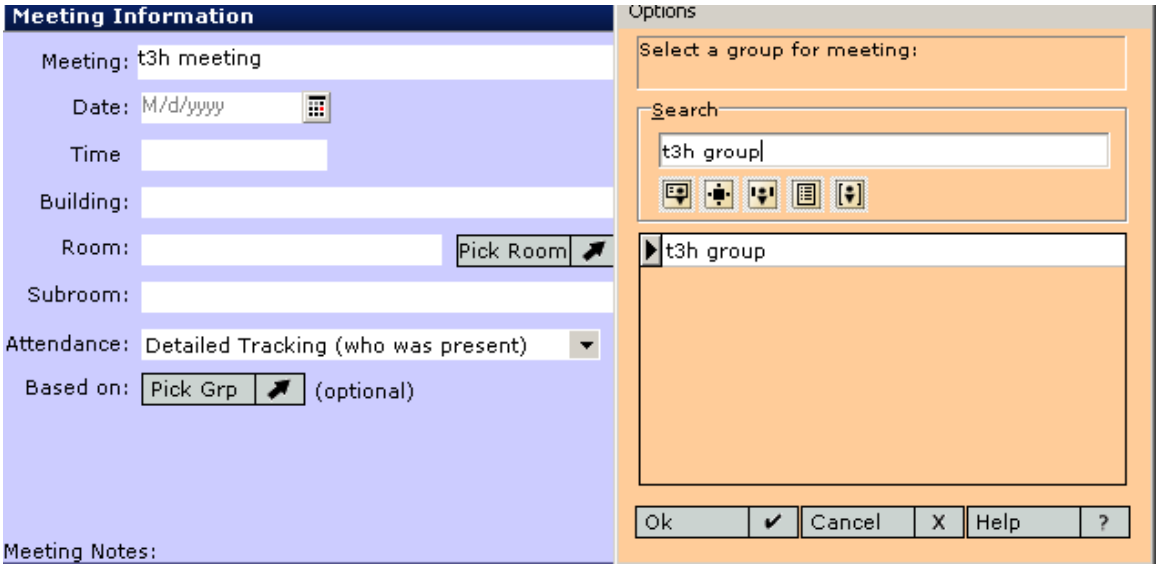
You should receive a confirmation stating the group was created, click no if you are finished with the report builder wizard.



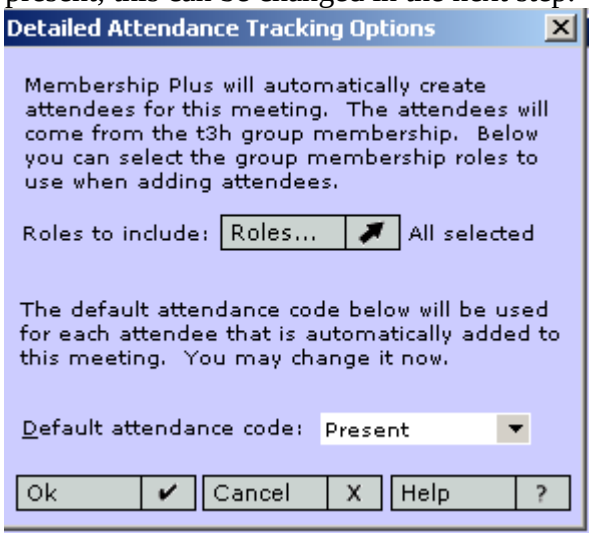
If you go to your "group" module you will now see the group we created. Double click on the group name and it's going to show the member's who were added to the group along w/ their roles. If you want to change roles of certain members this is where it's going to be done.

Now that we have the group created we need to setup a meeting to keep track of the group attendance.

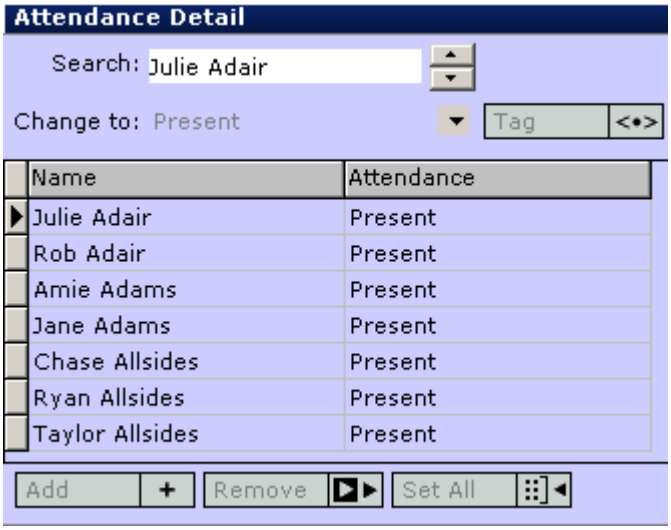
We'll need to name the meeting before we continue. We'll name this meeting, t3h meeting. Then pick the group for this meeting. Note : for the Attendance you will need to set this to Detailed Tracking (who was present). This will allow you to change who was present, absent, tardy, or late.



After you select the group you can select the roles to include. Each member plays a role within a group. In class-type groups, for example, most of the members are students, and one or a few are teachers or leaders. If you want, click roles to assign specific roles to certain individuals.
You can also select the default attendance code to present, absent, tardy, or excused. We'll leave the default attendance code Present, since most of the group attendee's are present, this can be changed in the next step. Click ok to proceed to the next step.

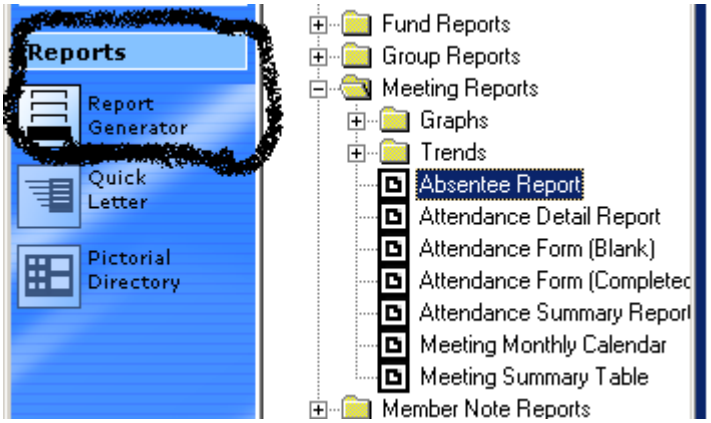

Detailed Attendance Tracking Options
Membership Plus will automatically create attendees for this meeting. The attendees will come from the t3h group membership. Below you can select the group membership roles to use when adding attendees.
Roles to include: Roles... All selected
The default attendance code below will be used for each attendee that is automatically added to this meeting. You may change it now.
Default attendance code: Present
Ok
Cancel
X
Help
?

This will now add the individuals of this group below. This will allow you to change the status of the individual members of the group based on their attendance. Click edit on the top toolbar, and then highlight the name of the individual.

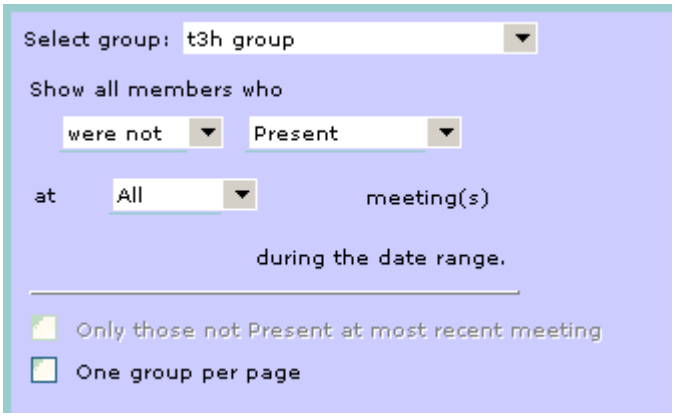


- F12 – Present
- F11 – Absent
- F5 – Tardy
- Excused will have to be done manually, by selecting “excused” from the drop down list and clicking on tag.

Once you have finished marking the individuals you will now be able to run a report. To run a report we will need to go to the report generator located under “Reports”. Then click the plus next to Meeting Reports.



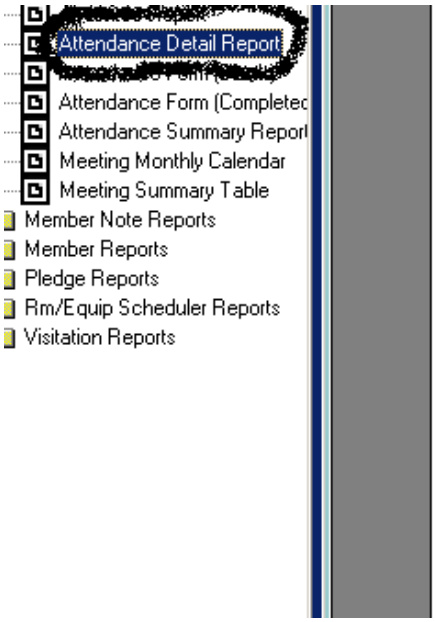
For this example we are going to preview the Absentee Report, based on the Date Range of 12.1.2004 – 12.31.2004. You will need to select the group to run the report off of. Then we can select if the members were or were not present, absent, tardy, or excused.



Click the Preview tab to "preview" the report. This will show the members that were not present during for this meeting. The count field indicates the number of "meetings" they were not present. If we had 12 meetings setup, it would show how many of the 12 that they missed for the date-range specified.

Name	Contact	Count
Julie Adair	(495) 878-3298	1
Rob Adair	(495) 878-3298	1
Amie Adams	(495) 404-9089	1
Jane Adams	(495) 404-9089	1
Ryan Allsides	(495) 593-8112	1
Brandi Bateman	(495) 849-3874	1
Mike Bateman	(495) 849-3874	1
Jennifer Bell	(495) 205-4722	1
Jason Bowen	(495) 249-1035	1
Jennie Brandon	(495) 324-1065	1
Katherne Butler		1
Sarah Caseberg		1
Mindy Cassmann	(495) 361-6963	1

The Detailed Attendance Report shows us the status of each individual at a specific meeting.



Meeting Info	Date	Time
t3h meeting	12/9/2004	
Attendance Detail	Attendance	
Julie Adair	Absent	
Rob Adair	Absent	
Amie Adams	Absent	
Jane Adams	Absent	
Chase Allsides	Present	
Ryan Allsides	Absent	
Taylor Allsides	Present	
Brandi Bateman	Absent	
Justin Bateman	Present	
Mike Bateman	Absent	

There are other “meeting” reports you can run to keep track of the group attendees.